

## Assets and Income

**Note:** In order to create or update an asset and income record, an assignment to the case is not needed. However, additional security is needed for the Assets and Income page when accessed via the Utilities menu.

The Assets and Income page allows workers to view and document asset, income, expense, and employment information for a person. Additionally, SSI information will display, if applicable.

1. There are three ways to access the Assets and Income page:
  - a. From any tab on the Person Management page, select Assets and Income from the Options drop-down and click Go.

The screenshot displays the cWiSACWIS ST Person Management interface. At the top, there is a navigation bar with tabs: Basic, Parent Info, Additional, Address, Education, Characteristics, Medical/Mental Health, and Supplemental MMH. Below the tabs, the 'Basic' tab is selected, showing a form for a person named Frank Burns. The form includes fields for Name, Gender (Male), Birth Date (06/10/1922), US Citizen Status (U.S. Citizen), County Person ID (122345), and Marital Status (Single Male). A dropdown menu labeled 'Options:' is open, showing 'Action' and 'Assets and Income'. The 'Assets and Income' option is highlighted with a red circle. At the bottom right, there are 'Save' and 'Close' buttons.

- b. From the desktop, expand the Assets and Income icon for the case. Click on the appropriate hyperlink for the participant.

The screenshot shows the eWiSACWIS web application interface. At the top, there is a navigation bar with tabs for Home, Cases (2), Providers (6), Workers (1), Approvals (2), and Access Reports (4). The 'Cases' tab is selected. Below the navigation bar, the 'Cases' section is displayed. It includes a 'View by:' dropdown set to 'Case', a 'Filter by:' section with checkboxes for 'Date restricted' and 'Not approved/cancelled' (checked), and a 'Cases: 2' indicator. The main content area shows details for 'Test, Case ( 70000000 )'. It includes case details, case address, and primary worker information. Below this, there is a 'View case information' section with a grid of icons for various case management functions. The 'Assets and Income' icon is highlighted with a red box. Below the grid, the 'Assets and Income' section is expanded, showing a list of entries with dates and descriptions. One entry, 'Assets and Income', is circled in green.

**Test, Case ( 70000000 )**

**Case details:**  
CPS Family - Ongoing - Private Adoption (Agency)  
SRO-DCFS-Madison  
Open OHP Exists

**Case address:**  
C/O: One Ten North Hall  
1050 Bascom Mall  
Madison, WI 53703

**Primary Worker:**  
Halberslaben, Maggie  
(608)685-4412  
[ewuat\\_10621388@wi.gov](mailto:ewuat_10621388@wi.gov)

**View case information**

- Access Reports
- Administration
- Adoption
- Assessments
- Assets and Income**
- Assignments
- Case/Permanency Plan
- Child/Youth Images
- Education
- Extraordinary Payment Requests
- ICPC
- ICWA
- Medical/Mental Health
- Missing Child
- Narratives
- Payments
- Permanency Consultation
- Placements
- Related People
- Safety
- Safety Services
- Services
- Strengths and Needs

**Assets and Income**

<a href="#">Assets and Income</a>	10/11/2017	Ajax, FSN
<a href="#">Assets and Income</a>	10/16/2017	Ajax, ICPC
<a href="#">Assets and Income</a>	11/01/2017	Ajax, ICWA
<a href="#">Assets and Income</a>	10/10/2017	Ajax, Mom
<a href="#">Assets and Income</a>	10/17/2017	Ajax, Nerf
<a href="#">Assets and Income</a>	10/17/2017	Ajax, OHP
<a href="#">Assets and Income</a>	10/11/2017	Ajax, PAA

2. On the Assets and Income page, when an MCI ID exists for the person, the [Cares Interface](#) hyperlink appears. When you click the hyperlink, eWiSACWIS will send a call to CARES to request a matched individual based on the MCI ID. eWiSACWIS will immediately update with all fields returned from CARES.

**Note:** If the MCI ID does not automatically populate with the individual's name, DOB and SSN documented, remove the individual's middle initial and tab out of the field, the MCI ID should then populate into that field.

3. The Assets/Income/Expenses tab displays a list of assets, income, and expenses. It allows you to search by type, as well as specific dates. Click Create to add a new asset, income, or expense record. This will open the Maintain Assets/Income/Expense Record.

The screenshot shows a web browser window titled "Assets and Income - Windows Internet Explorer". The application header is "eWiSACWIS" with navigation links for "Print", "Spell Check", "Help", and "Cares Interface". The main content area has three tabs: "Assets/Income/Expenses" (selected), "Employment", and "SSI History". Under the "Assets/Income/Expenses" tab, there is a "Person Information" section with the name "Appleton, Claire (9220007)" and a "Search" link. Below this is a "Search Criteria" section with a "View By" dropdown set to "All", "From" and "To" date fields both set to "00/00/0000", and a "Search" button. The "Assets/Income/Expenses Listing" area is currently empty. At the bottom right of the listing area is a "Create" button. At the very bottom of the page are "Save" and "Close" buttons. The browser status bar at the bottom right shows "100%" zoom.

4. The Maintain Assets/Income/Expense Record page allows you to view and document asset, income, and expense information for a person. Enter the Begin Date. If applicable, enter the End Date. Select a Record Type. The Include checkbox is used by the eligibility unit to verify the asset/income/expense information. Select a value from the Detail drop-down – the options that appear in the list are based on the Record Type that was selected. If applicable, enter an amount in the Disregard field. Click Save. Once the record is saved, a [Copy](#) hyperlink appears.

**Note:** When you select Countable Asset or Exempt Asset from the Record Type, the Monthly Amount field will disable and the Market Value field will display.

**Note:** When you select Child Support from the Detail drop-down (Type = Countable Unearned Income), the “Applies to” field will appear and a [Search](#) hyperlink will display to the right of it. Selecting the [Search](#) hyperlink will launch the Person Search page (for you to select the child that the child support applies to).

**Note:** When you select Child Support Paid from the Detail drop-down (Type = Expense), the “Applies to” field will appear and a [Search](#) hyperlink will display to the right of it. Selecting the [Search](#) hyperlink will launch the Person Search page. Selecting the No PID checkbox will disable the Search hyperlink.

**Maintain Assets/Income/Expense Record -- Webpage Dialog**

**eWiSACWIS** Print Spell Check Help

**Person Information**  
Name: [Appleton, Claire \(9220007\)](#)

**Maintain Assets/Income/Expenses Record**

Begin Date: 00/00/0000 End Date: 00/00/0000 Record Type: [dropdown] [Include] [Delete](#)

Detail: [dropdown]

Monthly Amount: \$0.00 Disregard: \$0.00

Description: [text box]

[Insert](#) [Save](#) [Close](#)

5. New records can be created by selecting the Insert button or by selecting the [Copy](#) hyperlink (if you have clicked Save), which will allow you to copy information from the existing records. Selecting the [Copy](#) hyperlink will insert a new record on the page. The inserted record will have a Detail identical to that of the record it was copied from, allowing you to modify the record. Click Close to return to the Assets and Income page.

**Maintain Assets/Income/Expense Record -- Webpage Dialog**

**eWiSA CWIS** Print Spell Check Help

**Person Information**  
Name: [Appleton, Claire \(9220007\)](#)

**Maintain Assets/Income/Expenses Record**

Begin Date: 06/27/2014 End Date: 00/00/0000 Record Type: Expense ☐ Include [Copy](#)

Detail: Dependant Care Expenses

Monthly Amount: \$750.00 Disregard: \$0.00

Description:

**Insert**

**Save Close**

6. The Assets/Income/Expenses tab now displays the newly inserted records. The Search Criteria section allows you to control the display of results based on the record type, as well as date parameters. The Assets/Income/Expenses Listing group box will display the retrieved records in the sortable columns. To change existing information, select the [Edit](#) hyperlink to access the Maintain Assets/Income/Expense Record.

**Note:** The Amount field will display in red for any expenses, however the negative needs to be manually entered in front of the amount so that it displays with parentheses around them which will then behave like a deduction on the Title IV-E Eligibility Financial Worksheet.

Assets and Income - Windows Internet Explorer

**eWiSACWIS** Print Spell Check Help

Person Information  
Name: [Appleton, Claire \(9220007\)](#) [Search](#) [Cares Interface](#)

Assets/Income/Expenses Employment SSI History

Search Criteria  
View By: All From:  To:  [Search](#)

Assets/Income/Expenses Listing

Begin Date	End Date	Amount	Type	Detail	Include	
06/27/2014	00/00/0000	\$750.00	Expense	Dependant Care Expenses	<input type="checkbox"/>	<a href="#">Edit</a>

[Create](#)

[Save](#) [Close](#)

100%

7. The Employment tab is used to view and update information about the person's employment history. To add new information, select the Insert button to open the Employment page.

Assets and Income - Windows Internet Explorer

**eWiSACWIS** Print Spell Check Help

Person Information  
Name: [Appleton, Claire \(9220007\)](#) [Search](#) [Cares Interface](#)

Assets/Income/Expenses Employment SSI History

**Employment History**

Eff. From	Eff. To	Employer	Wages	Per
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**Employment Address**

CO: Phone: Ext.:  
Street:  
City: State: Apt.: Zip: Country:

[Insert](#)

[Save](#) [Close](#)

100%

8. The Employment page is used to create or change information pertaining to employment records. The Effective From field will default to today's date but can be edited as needed. If applicable, enter an Effective To date. Enter the Employer and Wages, and select the frequency from the Per drop-down (hourly, bi-weekly, weekly, semi-monthly, month, year). If a W2 form is on file, select the "W2 on record" checkbox.

Enter the employer's address information. Click Save. Then click Close to return to the Assets and Income page.

The screenshot shows a web browser window titled "Employment -- Webpage Dialog" with the "eWiSACWIS" logo. The form is divided into two main sections: "Employment History" and "Employment Address".

**Employment History Section:**

- Effective From:** 06/27/2014
- Effective To:** 00/00/0000
- Employer:** [Empty text field]
- Wages:** \$0.00
- Per:** [Empty dropdown menu]
- W2 on record:** ☐

**Employment Address Section:**

- C/O:** [Empty text field]
- Phone:** [Empty text field]
- Ext.:** [Empty text field]
- Street:** [Two empty text fields]
- Apt.:** [Empty text field]
- WI City:** [Empty dropdown menu]
- City:** [Empty text field]
- State:** [Empty dropdown menu]
- Zip:** [Empty text field]
- Country:** [Empty dropdown menu]

At the bottom right of the form are two buttons: "Save" and "Close".



9. To change existing information, select the [Edit](#) hyperlink to access the Employment pop-up page. To view the employment address information, select the radio button next to the associated employer (in the Employment History group box).

Assets and Income - Windows Internet Explorer

**eWiSACWIS** Print Spell Check Help

Person Information  
Name: [Appleton, Claire \(9220007\)](#) Search [Cares Interface](#)

Assets/Income/Expenses Employment SSI History

Employment History

	Eff. From	Eff. To	Employer	Wages	Per	
<input type="radio"/>	06/27/2014	00/00/0000	Employer's Name here	\$12.50	Hourly	<a href="#">Edit</a>

Employment Address

CO: Phone: Ext.:  
Street:  
City: State: Apt.: Zip: Country:

Insert

Save Close

100%

10. The SSI History tab is used to view SSI Application and Benefits History. The tab displays information pertaining to SSI data that is received from CARES. The tab will update with the corresponding Application date. A SSI History row will be complete once an End Date is received from CARES. A new SSI row will be recorded once a Determination Date or Application Date is received.

The screenshot shows a web browser window titled "Assets and Income - Windows Internet Explorer". The application header is "eWiSACWIS" with navigation links for "Print", "Spell Check", and "Help". Below the header is a "Person Information" section with the name "Appleton, Claire (9220007)" and links for "Search" and "Cares Interface".

The main content area has three tabs: "Assets/Income/Expenses", "Employment", and "SSI History". The "SSI History" tab is selected, displaying a table with the following data:

Application Date	Determination Date	Begin Date	End Date	Denial Date	Appeal Date	Appeal Decision Date	Appeal Decision	
12/20/2011	12/01/2011	12/13/2011			03/22/2012	11/08/2012	Approved	

At the bottom right of the application window are "Save" and "Close" buttons. The browser status bar at the bottom indicates a zoom level of 100%.

To view the details of the SSI history, click on the Assets/Income/Expenses tab and click the associated [View](#) hyperlink.

Assets and Income - Windows Internet Explorer

**eWiSACWIS** Print Spell Check Help

Person Information  
Name: [Appleton, Claire \(9220007\)](#) Search Cares Interface

Assets/Income/Expenses Employment SSI History

Search Criteria  
View By: All From: 00/00/0000 To: 00/00/0000 Search

Assets/Income/Expenses Listing

Begin Date	End Date	Amount	Type	Detail	Include	
05/01/2014	00/00/0000	\$721.00	Exempt Unearned Income	SSI-Federal	<input checked="" type="checkbox"/>	<a href="#">View</a>
02/01/2014	00/00/0000	\$83.78	Exempt Unearned Income	SSI-State	<input checked="" type="checkbox"/>	<a href="#">View</a>
02/01/2014	00/00/0000	\$95.99	Exempt Unearned Income	SSI-E	<input checked="" type="checkbox"/>	<a href="#">View</a>
01/01/2014	04/30/2014	\$721.00	Exempt Unearned Income	SSI-Federal	<input checked="" type="checkbox"/>	<a href="#">View</a>
11/01/2013	12/31/2013	\$710.00	Exempt Unearned Income	SSI-Federal	<input checked="" type="checkbox"/>	<a href="#">View</a>
06/01/2013	10/31/2013	\$710.00	Exempt Unearned Income	SSI-Federal	<input checked="" type="checkbox"/>	<a href="#">View</a>
12/01/2012	01/31/2014	\$83.78	Exempt Unearned Income	SSI-State	<input checked="" type="checkbox"/>	<a href="#">View</a>
12/01/2012	01/31/2014	\$0.00	Exempt Unearned Income	SSI-E	<input checked="" type="checkbox"/>	<a href="#">View</a>

Create

Save Close

100%